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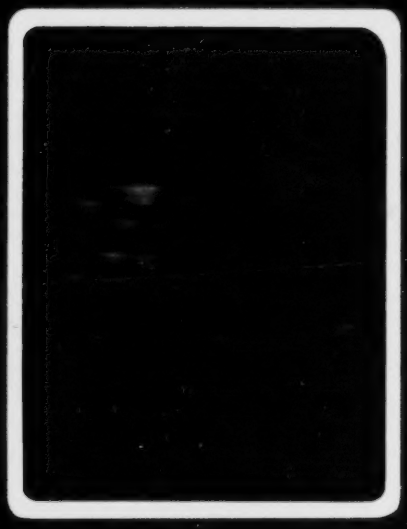
graphic arts monthly®

THE MAGAZINE OF THE PRINTING INDUSTRY



Once upon a time in an exhibition hall far, far away, the graphic arts industry gathered for PRINT 91

GAM 101 Ranking • *Focus on Chicagoland*

• *Small Shops, Savvy Upgrading*

VOLUME 63, NUMBER 8

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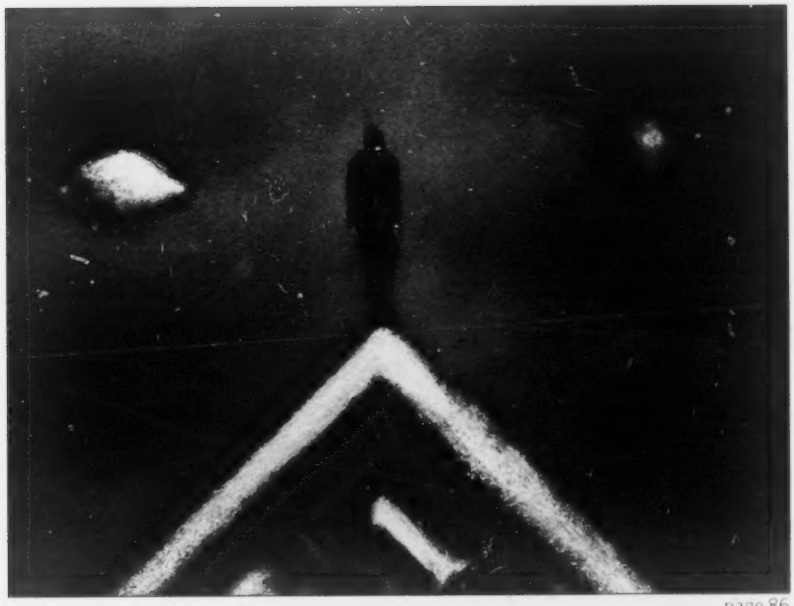
FEATURES



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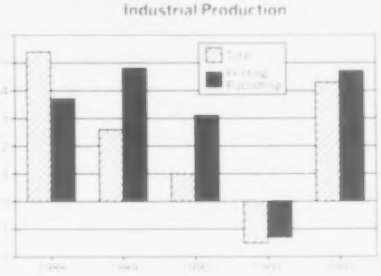
Industrial Production Still Slows



The latest industrial production data from the Federal Reserve Board shows that the printing and publishing industry has yet to bottom out. Compared to last year, the production index fell 1.1% in the first five months of 1991. This decline is expected to continue through the end of the year.

By 1992, the general economic recovery that everyone, from the most optimistic government economist to the most pessemistic private businessperson, should be in full force. The forecast calls for a 1.3% decline in 1991 followed by a 4.7% gain in 1992, which indicates quite a dramatic recovery for such a large industry, all things considered.

True to past form, printing and publishing still outperform the outlook for all industries; total industrial production is forecast to drop 1.5% this year and rise 4.3% next year. Periodical and book production remains the best-looking printing and publishing sector. Meanwhile, job printing production is experiencing its slowest period since 1986, and newspaper output is falling into a steeper slump.

Print Machine Prices Up, Barely

For those printers planning to purchase new equipment, *now* seems to be a good time. Not only are interest rates at reasonable levels, but equipment prices are also beneficial.

Prices of printing trades machinery, as measured by the producer price index, rose a slight 1.6% last year. That represents the slowest rate of increase in over a decade. As demand for equipment is low, equipment manufacturers have been unable to increase prices substantially, and, in fact, have been offering incentives of one kind or another in recent months. In the first five months of 1991, the price index increased 1.5% above the same period in 1990. With this trend continuing through the end of the year, expect price gains to be in the 2%—2.5% range over the next few years.

This month's table of printing activity indicators highlights the sluggishness of the industry. In particular, the newspaper sector continues to suffer from a slowdown in print retail and classified advertising. Job printing output is also in a bit of a slump. While total industry output is down, production and materials prices are also low. Paper prices are headed for a slight 0.9% gain in 1991. As the economy is expected to rebound in the second half of the year, the printing industry should start to see a turnaround in 1992.

PRINTING ACTIVITY INDICATORS

				Annual % Change			
Industrial Production (1)	**Apr 90**	**Mar 91**	**Apr 91**	**1990**	**1991**	**1992**	**1993**
Shipments (2)							
Producer Prices (3)							

Business Forms: New Directions

As business forms growth has slowed, distributors are offering more products and services.

The business forms industry has suffered the double whammy of a weakened economy, and changing technologies draining away chunks of its primary markets. Responding to the downturn has been painful. For example, last fall Moore, the nation's largest forms manufacturer, reported a 90% drop in earnings, as it paid charges related to an 1,100-person layoff. Numerous other forms companies have announced layoffs, and acquisitions are on the rise. Business does seem to be on a rebound now, and the future looks rosier, with the NAPL reporting its forms printer correspondents seeing a 5.4% sales rise during the first part of this year.

The business form, a document designed to collect information, is generally produced on specialized presses. These feature marginal punching and perforation, printing roll-to-roll or roll-to-pack (zig-zagged stacks of forms), so the form can be run afterward through computer printers. The form itself consists of the fixed information (rules, captions, the preprinted part) and the variable information that is filled in by hand or machine.

Use of many familiar forms is waning. Credit card slips, bank machine receipts, and other forms are being supplanted by blank register tapes. The multipart forms with carbon interleaves are supplanted by the nation's six million laser printers, able to print the form and other data in one pass. And electronic transactions of all sorts eliminate the use of forms in collecting and conveying information.

These business problems have been worsened by the economic downturn. But forms firms are not taking it lying down. Well served by trade groups—e.g., the National Business Forms Association (NBFA), the International Business Forms Industries (IBFI), and the Business Forms Management Association (BFMA)—the forms industry is going through massive adjustment to retain a role in a dramatically changing marketplace.

Combatting the rising use of blank register tapes, for example, forms makers now market register tapes with colorprinting along the margin. As with many areas of forms printing, the substituted product doesn't have the same value added as the product it replaces.

Carbon interleaved forms have declined in popularity as lighter and cheaper carbonless forms increase in usage. Forms presses are designed for either long-run stock forms (standard size with no special logos printed on them), or custom forms (special sizes or imprinted with corporate logos). A continuous form will be collated at the end of the run, to bring the multiple parts (with or without carbon interleaves) together. The noncontinuous unit set, or snap set, is also declining in popularity, according to industry sources.

The change has been well documented by the IBFI, a major source of data for forms manufacturers. The PIA affiliate last year produced "Perspective 90: The Present and the Future of the North American Forms Manufacturing Industry." In over 30 years of data collection, IBFI

By Bill Esler
Midwest Editor

Peter Newcomb

shows the decided swing from unit sets to continuous forms.

"There's been a change in product mix," says Bob Nevin, president of Reynolds & Reynolds, Dayton, Ohio. "Continuous forms subsitituted for unit sets, and now cut sheets are substituting for continuous forms."

Cut sheets are readily printed on commercial presses as well as forms presses, adding a new group of competitors in one of the industry's growth areas. Any printer can print them. Though laser printers can print the fixed and variable information in a single swipe, generally laser printers don't apply color to make an attractive form. So demand for preprinted cut sheet forms will continue to rise.

Forms firms can turn the tables on commercial printers entering their markets, by adapting presses to commercial work. As a color-conscious business community drove forms printers to add more color units, they can now print quality color work, too. Some do commercial non-heatset jobs, such as placemats. The marginal holes can be slit off, or the processing sections removed, turning them into roll-to-sheet presses. Some shops have added UV or gas-fired driers, and turn out glossy color direct mail items, often printing roll-to-roll or roll-to-pack, with marginal holes for feeding and imprinting through addressing systems.

"That's being done extensively," notes AM Schriber's Thomas Carroll. Preparing direct mail for computer imprinting is a lot like forms runs. "The forms printer is really well versed in that." But forms presses generally are one-sided printers, not blanket-to-blanket. So their entree to commercial web work will be in limited fields, like direct mail, where the presses have other advantages, too.

The forms industry consists of three major groups: big forms manufacturers, independent

Typical Products

Continuous Custom & Stock Forms
Sales Books
Unit Sets
Fanfold Forms
Carbonized or Carbon-interweaved

Typical Users

Business Establishments of all sizes
Utilities
Financial Services
Retail Trade
Computer Services

forms makers and their dealers, and purchasers of forms. The three categories cross over at times. Of some $7.8 billion in forms produced in 1990, the vast majority (70% or more) are produced and sold by the big manufacturers with captive sales staffs, direct to purchasers.

Forms printing is concentrated. The 20 largest firms produce 70% of the volume; the top 50 do 85%, according to GATF's 1989 study of the forms industry. All told, about 450 firms operating 600 plants are the nation's forms specialists, with another 125 firms doing forms as a minor part of their business. Commercial and quick print shops produce 4% of the nation's forms volume. Independent forms dealers probably number around 2,500, and sell forms as a major line. Each of the independent forms manufacturers that sells through dealers has, typically, 500-800 active distributors.

By not having a direct sales staff, independent forms makers have lower sales costs, but lower margins, as well. (The median forms distributor achieved a gross margin of 31.5%, and generated $186,000 in sales per employee, reports the NBFA). A smaller avenue of sales, direct mail, is projected to grow at twice the rates of total forms growth for the next few years. Captive and independent forms manufacturers have also entered the direct mail arena as a result.

In recent years, the dealer network has expanded in influence, if not market share, representing independent forms makers who sell only to the trade. Forms dealers and the purchasers of forms have taken on an added role, of late, in designing forms with desktop programs. As many as one-third of forms dealers now generate customer designs and transmit them electronically to the manufacturers, either for output through an image setter, or to be electronically adjusted to fit the specifications, repeat lengths, etc. of the pressroom before output.

"The smart forms printers will work with the users, who may design the forms, but transmit it directly to the vendors," says Norm Chilton, a forms consultant and former president of the 2000-member BFMA.

Rising paper prices for 15-lb forms bond, electronic data interchange, and data gathering at "forms on the screen" of computer workstations have also hurt business. While paper costs have stabilized, electronic data interchange and electronic forms data gathering are expected to dampen forms usage. The implications of this trend were examined in two reports: Printing 2000, and IBEF's "The Challenge of Electronic Data Interchange." The Electronic Data Interchange Association reports over half the Fortune 500 companies use EDI for business operations, especially invoicing and purchasing.

Software for designing computer screen forms, a trend in its infancy, can also generate original artwork for transmission to the forms printer.

"Forms change all the time," notes Lisa Burton of Graphic System West, Ventura, Calif. Burton is also a member of the BFMA, and a certified forms consultant. "It's too expensive to alter forms that are fixed in cement once you get them printed. So people are looking for ways to alter their forms quickly, and cost-effectively. And they're doing it with cut sheet forms, and electronic forms. That's the future."

BY NOT HAVING A DIRECT SALES STAFF, INDEPENDENTS HAVE LOWER SALES COSTS, BUT LOWER MARGINS, AS WELL.

The NBFA, with over 2,300 member companies, services independent forms printers and their dealer outlets. The dealers do more than just spin through a sample book and take orders. They now have software for creation of forms. "We have a very large special interest group for electronic design," says NBFA's Marge Green. "Some of them are quite advanced. Many of them even have imagesetters."

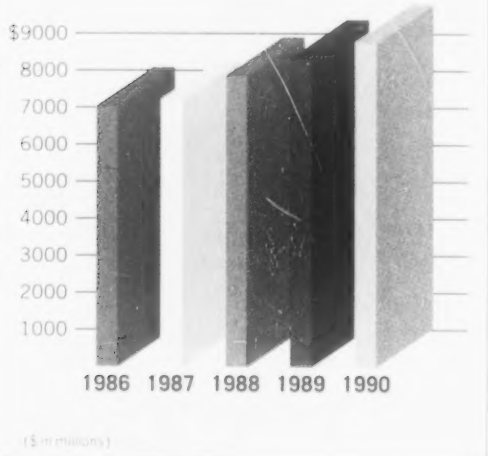
According to Green, distributors have about 23% of the market, and holding, versus 70% with direct selling forms manufacturers. "The whole forms market has flattened out," she notes. To combat this, business forms dealers offer an expanding array of products (labels, direct mail, promotional printing, including novelties, and commercial work. "Quite a few are trying to specialize in the new services they can provide in relationship to the products."

With distributors taking orders for a wider range of offerings, their forms suppliers have an opportunity to enter new markets. For Block Graphics, a Portland, Ore. independent forms manufacturer, this has meant a new plant and equipment.

"We manufacture business forms, envelopes, letterhead, laser cut sheets, and commercial printing," says Block's Dick Weigand, vice president of sales and marketing. Operating three plants in Portland and one in Los Angeles, Block has been driven

Business Forms

1990 Print Sales: $8,754 (millions)



($ in millions)

Business Forms

Rank	Company	Sales in millions*
1	Moore Business Forms Inc.	$1,215.0
2	Standard Register Company	460.0
3	UARCO Inc.	455.0
4	Bowater Communication Papers	280.9
5	Reynolds & Reynolds Co.	260.0
6	Duplex Products	253.0
7	New England Business Service	145.0
8	American Business Products	140.0
9	Wallace Computer Services	135.0
10	Data Documents Inc.	120.0

Note: Preliminary Ranking *Source: Post Publications*

by its customer base, independent forms distributors, to expand into new markets.

"The first move was into the envelope business," says Weigand. "There was a perceived need on the part of our distributors that encouraged us to imprint ready-made envelopes. Then later on, as we got into it, we found we needed to manufacture the envelopes from the ground up." Now Block Graphics operates a separate envelope converting plant, as well as a 45,000-sq-ft forms printing plant, and a 32,000-sq-ft commercial printing plant centered around a two-color Heidelberg press, the company's newest addition. Under construction in Los Angeles is a 50,000-sq-ft plant for forms, commercial work, and envelopes.

Distributors have driven the move into envelopes and commercial work, says Weigand. "We may be a bit unique in that we constantly seek the counsel of our distributors." Meetings are held twice annually in Portland. Like other independent manufacturers, Block Graphics is not that well known to most end users of its products, who know their local distributor as the source. But some of the larger volume end users do meet with Block Graphics to review production issues, and are aware of the behind-the-scenes supplier. Block markets 100% through distributors.

Weigand is chairing a research committee, producing a report called Futrends, that will be issued by the NBFA in October. It will try to identify the role of the independent forms distributor in the year 2000.

Paris Business Forms, which sells through dealers, has been adding to its outlets, which grew from 1,700 to 2,500 in the past year. "Anybody in the business who is trying to expand has to add on new products and capabilities," says Joe Massucci, the firm's marketing manager. "It's the only way you can satisfy most of your customers." Paris will produce commercial jobs on its forms presses, as customers require. "Sometimes it's just putting an adapter or a perf bar on a regular press, and you can go from a continuous to a cut sheet product," says Massucci.

New England Business Service, Townsend, Mass., has built its forms business on direct-mail sales, but now has branched out with a division to sell forms (DFS Business Forms), which sells through office products dealers, independent forms distributors, computer shops, accountants, and printers.

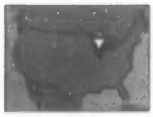
Duffie Graphics, formerly Byrd-Duffie Forms, has made its strength selling through commercial print shops. Its printer dealers, numbering around 2,000, have allowed it to maintain a stable business, as print customers look for forms at their regular printing outlet. "We never witness this recession," says Gerald Duffie, president. "Our business has been good." A slight slowdown in February and March was the only sign of the down economy. Unlike some forms printers, Duffie doesn't do commercial work, since he would be competing with his principal sales outlets.

Another approach to markets is vertical integration: offering not just the forms, but the software and the hardware to consume them. Reynolds & Reynolds offers equipment and software, along with the consumable forms, specializing in auto dealers as a market. Wallace Computer Services and Moore both make their own carbonless papers, and also offer finishing and decollating equipment for customers' printed continuous forms. Wallace recently introduced a unit for finishing forms printed by its customers' high-speed laser printers.

The integration of forms and computers will provide opportunities in the marketplace. Forms management software, setting up turnkey computer forms systems, and consulting and training services for smaller customers, will be avenues for maintaining the forms market, suggests the IBFI report, Perspective 90. But IBFI's conclusion is perhaps the most salient point: forms makers can continue to sell traditional products, but must refocus on customer service in order to survive and prosper.

graphic arts monthly

The Heart of The Industry



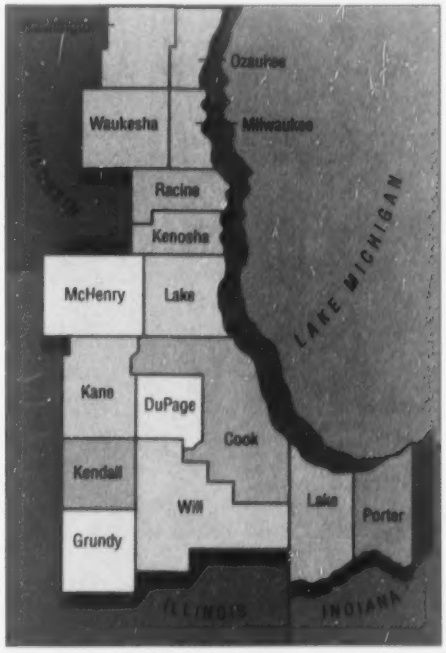
Carl Sandburg called it "city of broad shoulders, stacker of wheat, hog butcher to the world," and other poetic epithets designed to convey that Chicago, any way you want to measure it, is an industrial and mercantile heavyweight. That was true in 1916 when Sandburg wrote it, and it's true now.

One field of endeavor in which Chicago is in some ways not merely the heavyweight is the printing industry. Some of this is due to its position as the premier city of the Midwest; the regulations and pricing structure of the United States Postal Service (and of the Post Office Department before it) dictate that printed material to be distributed all over the country can be most economically produced somewhere near its middle. Satellites and remote printing have changed some of that, but Chicago's importance to the industry remains.

As the population and industrial density in surrounding areas continue to grow [see "The New Chicago Loop," *GAM*, September 1989], it becomes increasingly difficult to say exactly where greater Chicago leaves off and the rest of the East North Central region begins. For this article we have tried to look at it fairly narrowly, though we have, of course, been forced to go beyond Cook and DuPage counties, the ones actually within the city limits.

Although the recession in the Northeast and the Southwest have gotten more national press, it has clearly been a little rough in Chicago over the past couple of years. More than 60% of those surveyed reported a drop in sales, from 1989 to 1990. Profitability, however, possibly because of cost-cutting measures, was up for 1990.

In comparing our figures for Chicago with those for New York, the other singular city studied in this series, we find some interesting contrasts. Both for 1989 and 1990, the percentage of Chicago printers reporting running at a loss was less than half that in New York. While neither city had high Perception Index numbers, twice as many Chicagoans thought business was up than New Yorkers. (Three times as many New Yorkers thought it was down.)



Jean Wentworth

Inside this detachable fold-out form we present a general profile of the graphic arts industry in the Chicago metropolitan region, a close look at commercial printing, demographic data, and listings of leading printers in major markets. Data sources are given on the charts and tables.

The most revealing portion presents survey results among commercial printers. It shows sales changes from 1989 to 1990, the extent of those changes, profitability and capacity comparisons, and a business perception index.

Reprints of this installation of Print Market Trends may be ordered from Carol Bien, Cahners Publishing, Reprint Department, 1350 E. Touhy Ave., Des Plaines, IL 60018.

By Peter Johnston
Special Projects Manager

Regional Overview

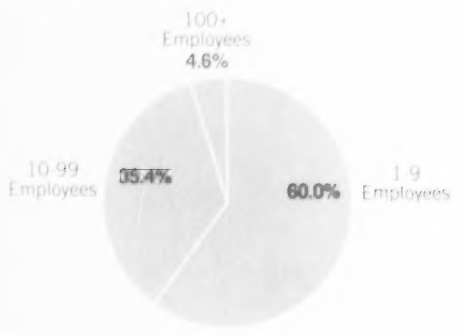
While Chicago itself is sprawling, the printing industry remains remarkably compact given its influence here. This pattern is changing, but our figures show almost one-third of the city's printing sites in Cook County alone, the very heart of Chicago. A look at the educational attainment demographics shows characteristic urban pockets of affluence (high rates, especially for college graduates) and poverty. Unlike New York, there seems to be no correlation between these numbers and printing activity.

POPULATION AND PRINTING SALES

County	Printing Sites	Population
ILLINOIS		
Cook	976	5,297,290
Du Page	166	727,700
Kane	39	305,800
Lake	58	480,200
McHenry	17	162,400
Will	17	338,400
TOTAL, ILLINOIS	**1,273**	**7,312,050**
INDIANA		
Lake	29	491,700
Porter	9	123,100
TOTAL, INDIANA	**38**	**614,800**
WISCONSIN		
Kenosha	12	120,000
Milwaukee	160	932,400
Ozaukee	8	69,100
Racine	16	172,300
Washington	7	89,400
Waukesha	57	288,800
TOTAL, WISCONSIN	**260**	**1,672,000**
TOTAL, GREATER CHICAGO	**1,571**	**9,589,850**

Source: U.S. Dept. of Commerce, Bureau of the Census

Plants by Employee Count



Source: GAM 1990 Plant Equipment Market Profile

Charts and graphs by Lisa Hilgers

Educational Attainment

County State	High School Graduates	College Graduates
U.S. Average	66.5%	16.2%
Cook, IL	64.3%	17.1%
Du Page, IL	83.1%	29.0%
Kane, IL	70.6%	16.7%
Lake, IL	77.6%	25.1%
Lake, IN	63.3%	10.1%
Milwaukee, WI	68.5%	15.7%
Will, IL	70.2%	14.3%

Source: U.S. Department of Commerce, Bureau of the Census

Concentration of Business by Type

Chicago printers tend to be somewhat larger than the national norm. This index, based on various issues of PIA's Financial Ratio Studies, shows a somewhat startling factor of 54%. We also, based on the same data, see a slightly slower-than-average growth rate for Chicago printers.

Size Index

U.S. Average	100
East North Central Region	97
CHICAGO	154

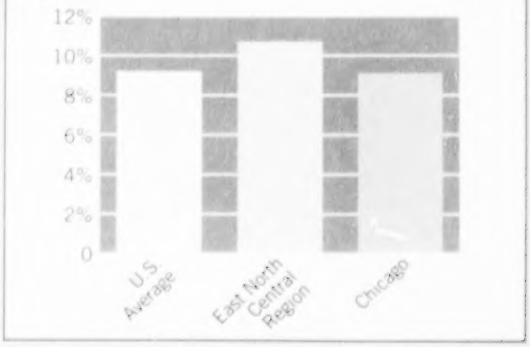
(Based on average sales value, 1980-1989)

Profitability Index

U.S. Average	100
East North Central Region	104
CHICAGO	128

(Based on income/assets, averaged, 1980-1989)

Growth



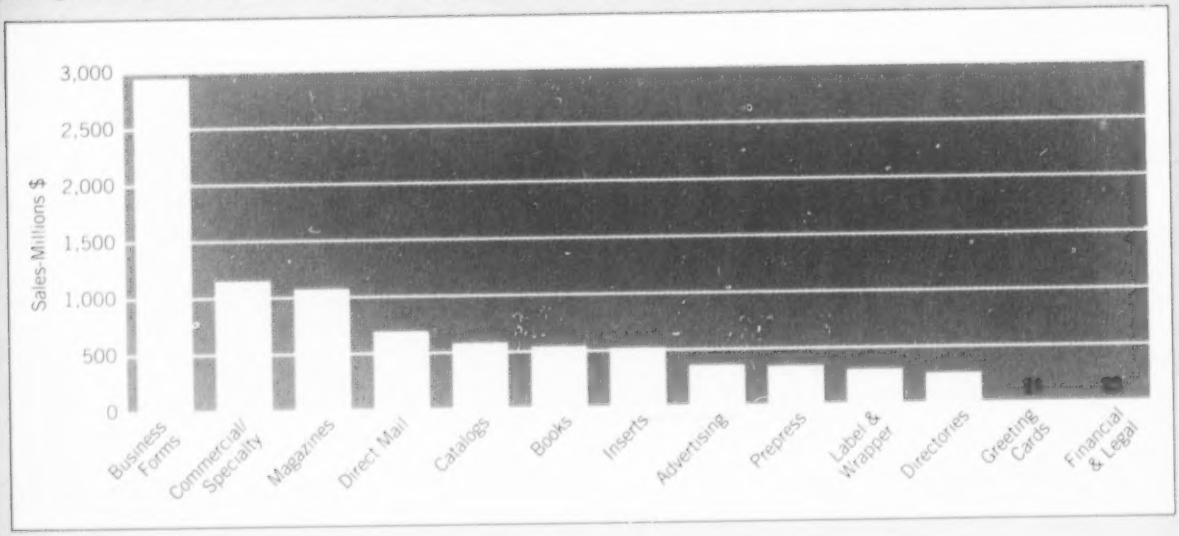
(Estimated compound annual growth rate of printing shipments, 1980-1989)

Source: Printing Industries of America Financial Ratio Studies

Market Profile

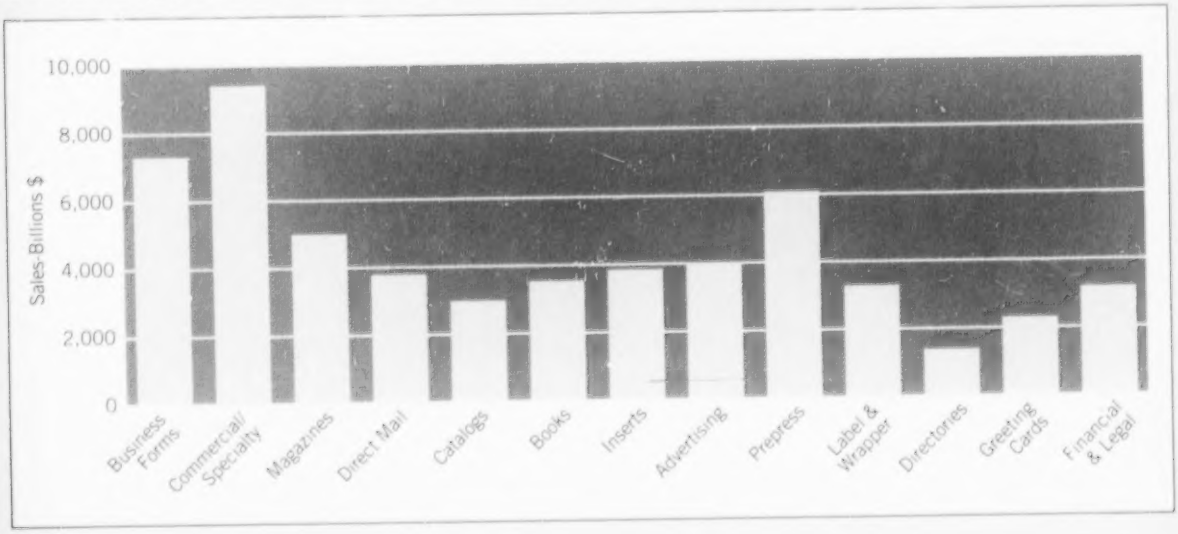
Ranking of Product Segments . . .

Sometimes geography is destiny. Business forms is in general an important market in the Chicago area, but it is the presence of one company, Moore Business Forms, that gives the category its top-heavy edge. Otherwise, Chicago's printing industry is weighted toward big-shop, long-run, nationally-distributed products, and lots of them: magazine printing, at number three, still represents more than $1 billion in annual revenues in this geographic region. Still, as one printer noted, many are "redefining their role in the market, to increase sales, and are becoming multilevel."



. . . Compared to National Totals

Otherwise, just as in the nation as a whole, commercial/specialty printing is right at the top of the list. The big dropoff comes in greeting cards and business forms—again a function of geography. The big greeting card manufacturers—and Wall Street—are located elsewhere. In general, price, delivery and technology top the list of printer concerns. These figures, it should be noted, are based on a 1988 survey of major printers, the most recent available. The revised research, due out shortly, will likely paint a different picture of the Chicago, and national, printing industry.



Leading Printers in the Region

COOK COUNTY ILLINOIS

American Envelope, Chicago
American Printers & Litho, Chicago
Bagcraft Corp. of America, Chicago
Collins, Miller & Hutchings (Wace), Chicago
Columbia Graphics, Chicago
R.R. Donnelley/Chicago, Chicago
R.R. Donnelley/Financial, Chicago
E&D Web Offset, Cicero
Emergency Bus. Forms/General, Niles
Enteron Group, Chicago
Esselte Mito (Esselte), Bedford Pk.
FCL Graphics, Harwood Heights
Fort Dearborn Litho, Chicago
Graphic Converting, Chicago
Graphic Products, Chicago
Jahn & Ollier (Wace), Chicago
Johnson & Quinn, Chicago
Kieffer-Nolde, Chicago
Liberty Photo Engraving, Chicago
Masterpiece Studios, Cicero
Merrill/Chicago, Chicago
Neely Printing, Chicago
Nobart Inc., Chicago
Reilly Graphics (Wace), Chicago
Revere Graphic (Enteron), Chicago
Schiele Graphics, Chicago
Service Web Offset, Chicago
Stone Container, Chicago
Stuart-Hooper Bus. Forms, Chicago
Superior/Premier (Enteron), Chicago
Viking Enterprises, Chicago
Wicklander Printing, Chicago

NORTH SUBURBAN

AGI Incorporated, Melrose Park
Alden Press, Elk Grove Village
Berlin Industries, Addison
Black Dot (Devon), Crystal Lake
Booklet Binding, Broadview
Bradley Printing, Des Plaines
Brookshore/Banta, Elk Grove Village
Carlith (Devon), Carpentersville
Carqueville, Elk Grove Village
Champion Bus. Forms, Glendale Hts.
J.J. Collins' Sons, Melrose Park
Computer Color (Enteron), Hillside
Continental Dataforms, Elgin
Continental Web Press, Itasca
CST Group, Wheeling
Distributors Stock Forms, Addison
Duplex Products, Sycamore
Elgin Business Forms, Elgin
Fenton Press, Addison
Form Service, Schiller Park
Forms Corp. of America (Whitestar Graphics), Spring Grove
Gaylord Container, Deerfield
General Business Forms, Skokie
Graftek Press (Devon), Woodstock
Inland Litho, Elk Grove Village
A.J. Kennedy & Co. (Graphic Industries), Elmhurst
Kukla Press, Elk Grove Village
Kukla-Webmasters, Elk Grove Village
Lake Book Mfg., Melrose Park
Lancaster Press, Melrose Park
LeFebvre Intergraphics, Des Plaines
Lehigh Press/Cadillac, Broadview
Lehigh Press/Colortronics, Elk Grove Village
Lithocolor Press, Westchester
Lord Label & Mfg., Skokie
Mercury Press, Forest Park
Meyercord Co., Carol Stream
Mid-City Litho, Lake Forest
Moore Business Forms, Glenview
Nosco, Inc., Waukegan
OEI Business Forms, Itasca
Packaging Corp. of America, Evanston
J.S. Paluch Company, Schiller Park
Perfect Plastic Print, St. Charles
Print-O-Tape, Libertyville
Rand McNally, Skokie
Redson Rice, Elk Grove Village
Response Mktg./Moore, Libertyville
Ringier America, Itasca
Rittenhouse, Park Ridge
Schawk Inc., Des Plaines
Screaming Color, Itasca
Segerdahl Corp., Wheeling
Sleepeck Printing, Bellwood
Strathmore Company, Geneva
Tech Web Inc., Wheeling
Treasure Chest, Elk Grove Village
UARCO, Inc., Barrington
United Computer, Elk Grove Village
Wallace Computer, Hillside
Wallace/Business Forms, Hillside
Wallace/Wallace Press, Hillside
Weber Marking, Arlington Heights
Wessel Company, Elk Grove Village
Whitestar Graphics, Spring Grove
Wright Business Forms, Broadview

SOUTH SUBURBAN

Apollo Label (Wallace), Worth
Combined Comm. Services, Lisle
R.R. Donnelley/Dwight, Dwight
Fisher Printing, Bridgeview
Jet Lithocolor, Downers Grove
MPI Label Systems, University Park
Northern Bank Note, Countryside
Solar Press, Naperville
TimeMed Labeling Sys., Burr Ridge

For current sales revenue, market segment, and ranking data, see 1991 edition of *Printmarkets*, Trade & Technology Press, Stamford, Conn. Preliminary information.

How Printers Are Doing

Based on a survey of firms in the region, conducted by Cahners Publishing

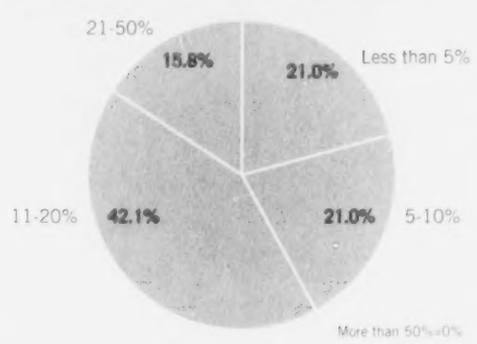
Profile of Respondents

Commercial printers in the greater Chicago metropolitan area responding to a recent mail survey reported year-over-year changes in their annual sales, profitability, and operating capacity. They also revealed how they perceived the outlook for business in their area. The following data is as reported by survey respondents; 1990 gross sales were estimated.

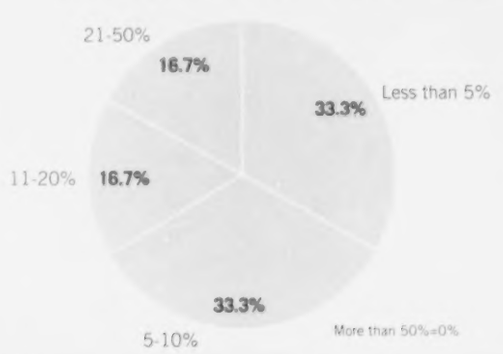
Gross Sales in 1990		# of Employees	
Less than $500,000	4.5%	1-4	4.5%
$500,000-749,999	15.9%	5-9	11.4%
$750,000-999,999	6.8%	10-19	45.4%
$1 million-2,499,999	40.9%	20-49	27.3%
$2,500,000-4,999,999	15.9%	50-99	11.4%
$5,000,000-9,999,999	13.6%	100+	0%
$10 million or more	2.3%		

How Sales Changed, 1989 to 1990

If Sales Increased, How Large Was Increase?

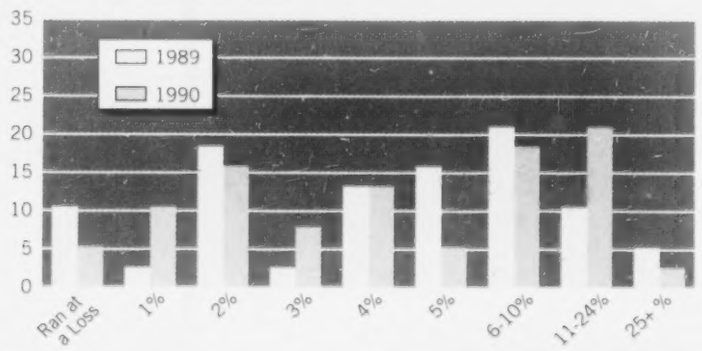


If Sales Decreased, How Large Was Decrease?

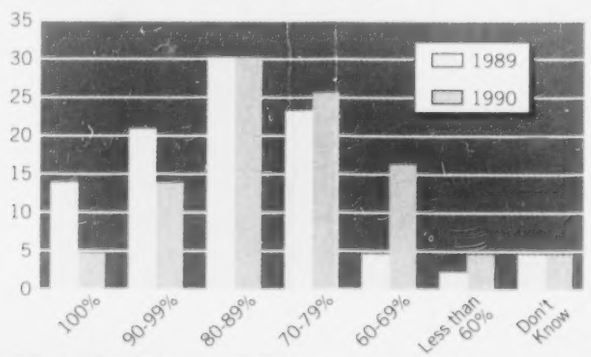


PROFITABILITY & CAPACITY

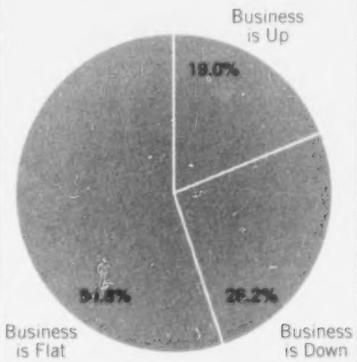
Profit as a percentage of gross sales



Operating percentage of plant capacity



Perception Index



Comments by Printers

- We are growing out into the shorter run area, under 20,000 copies.
- Specialty printers seem to have an advantage over commercial and instant printers.
- There seem to be a lot more quick-print operations.
- While the dollar value may remain the same or increase slightly, the actual number of jobs (work committed) is declining.
- Competition has grown so much that available business is spread over a bigger number of companies. Overall business seems to be stable.

BEST AVAILABLE COPY

Fighting Recession

Thirty-three companies posted sales volume gains of 10% or more, a slight dip from 1990.

For the second consecutive year, the general slowdown in business activity continues to have negative effects on North America's leading printing companies.

The number of companies in our 1991 ranking of the top 101 printing companies reporting declines in sales revenues has increased. The results of the annual industry survey revealed that 33 companies posted sales volume gains of 10% or more, a slight dip compared to the 40 companies in 1990. By contrast, in 1989, more than half reported two-digit percent gains in sales revenues.

Also increasing is the number of companies with either no gain or a negative percentage change in year-to-year sales comparisons; the count went from 20 last year to 28 this year. The remaining 39 on the main GAM 101 list posted gains of 9% or less.

However, lest we misinterpret this slowdown for a major business slump, it should be pointed out how solid the North American printing base is, and how decent its fiscal performance is, as measured in terms of annual sales, particularly when compared to other large industries. Major players in many other fields would be proud to have posted such gains in fiscal 1990-91 over fiscal 1989-90.

Data for virtually all the listings were obtained from the companies themselves, most often in response to a mailed questionnaire, but sometimes obtained by telephone and facsimile machine. In a few cases, sales figures had to be estimated because of accounting practices, nondisclosure policies, or because recent major acquisitions made simple sales-figure comparisons impossible or meaningless.

Carol Mauzy

Readers should note that direct comparisons of company sales figures and performances are not advised; some reasons are obvious—commercial printers include billings for paper while publication printers do not—and others relate to unusual events such as acquisitions or divestitures, reporting methods, and changes in fiscal reporting periods.

Respondents are always asked for the most recent fiscal year figures. Also, currency conversions were necessary for Canadian firms; for this, a common factor was applied throughout.

Finally, in certain closely integrated operations, it remains impossible to separate printing revenues from other income, which blurs direct comparisons.

Despite these necessary qualifications, the 1991 GAM 101 list stands as the industry's best ranking of major printing firms, given the constraints of time and the privately-held nature of the industry. Some familiar names no longer exist; others asked not to be included.

Special thanks to Associate Editor Lisa Cross for her tireless efforts compiling the 101; others heavily involved were Editor Roger Ynostroza and Art Director Karen Lehrer.

If the detachable 1991 GAM 101 double-gatefold form facing this page is missing, send $5.00—payment with order, please—to Carol Bien, Reprint Services, Cahners Publishing Company, 1350 E. Touhy Ave., Des Plaines, Ill. 60018.

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GAM 101
Official Industry Ranking Of The Top Printing Firms

This detachable double-gatefold form contains the 1991 official ranking of the 101 largest printing companies in North America, ranked by sales volume for their most recently completed fiscal year, along with salient information (ranking by employee, number of employees, types of press units, primary products, and so on) for each company that's listed.

Coco Masuda

In addition, there are listings of the top business forms printers, greeting card manufacturers, and color trade shops. These rankings are maintained separately in an effort to avoid distortion of the main list, which concentrates on commercial printers and publication-type printers.

Data for virtually all the listings were obtained from the companies themselves. Very few companies projected their sales figures or offered estimates; if so, it was either due to accounting practices or recent acquisitions. For Canadian companies, a single currency exchange rate was applied.

A word of caution: use of the data to make direct comparisons can be very misleading, even though every effort has been made to exclude non-printing revenues. The biggest discrepancy: commercial printers generally include billings for paper, while publication printers customarily do not. These qualifications notwithstanding, we believe the GAM 101 ranking to be the best available overview of the industry's leaders.

Additional copies of the 1991 GAM 101 are available for $5.00 each; send payment with order to Carol Bien, Reprints—Cahners Publishing, 1350 E. Touhy Ave., Des Plaines, IL 60018.

RANKING BY EMPLOYEE

1	R. R. Donnelley	30,000	33	Taylor Publishing	1,200
2	Deluxe Corp.	17,174	34	Shorewood Packaging	1,100
3	Quebecor Printing	10,500	35	Bertelsmann	1,100
4	Lawson Mardon	7,500	36	Judd's	1,066
5	Arcata Graphics	7,500	37	Publishers Press	1,046
6	World Color Press	6,000	38	Lehigh Press	1,000
7	John H. Harland	5,600	39	United States Banknote	990
8	Ringier America	5,300	40	Ivy Hill	970
9	Quad/Graphics	5,000	41	Queens Group	918
10	Southam Graphics	4,100	42	Merrill Corp.	850
11	Sullivan Graphics	4,060	43	Serigraph Inc.	820
12	Banta Corporation	3,700	44	Graphic Arts Center	800
13	Clarke American	3,391	45	Sheridan Group	770
14	Jostens	3,500	46	Fleming Packaging	750
15	Treasure Chest	3,200	47	Hart Graphics	750
16	Continental Graphics	3,200	48	Shea Communications	725
17	Brown Printing	3,100	49	Graphisphere	705
18	Graphic Industries	2,783	50	Alden Press	700
19	Western Publishing	2,500	51	Edwards Brothers	700
20	Trans-Continental	2,471	52	Combined Communication	650
21	American Signature	2,400	53	Webcrafters	630
22	Americribe Management Services	1,900	54	K/P Companies	625
23	Cadmus Communications	1,820	55	Waverly Press	610
24	Perry Printing	1,750	56	Alford Industries	600
25	Bowne & Co.	1,700	57	Solar Press	600
26	Webcraft Technologies	1,600	58	Prolitho	600
27	Courier Corp.	1,402	59	Keller-Crescent	560
28	Mack Printing	1,400	60	Moebius Printing	559
29	Engraph	1,370	61	Gulf Printing	530
30	Valassis	1,207	62	Meehan-Tooker	530
31	Stevens Graphics	1,200	63	Graftek Press	527
32	Instant Web Companies	1,200	64	Case-Hoyt	500
			65	Petty Co.	500
			66	George Rice & Sons	484
			67	Spencer Press	470
			68	Cairn Capital	454
			69	Anderson Lithograph	450
			70	Wisconsin Color	450
			71	Continental Web Press	425
			72	Sleepeck Printing	425
			73	Arandell-Schmidt	413
			74	AGI Incorporated	408
			75	Avanti Press	400
			76	Northeast Graphics	400
			77	Japs-Olson	400
			78	Universal Printing	400
			79	Williamson Printing	390
			80	Henry Wurst, Inc.	370
			81	Century Graphics	360
			82	Fort Dearborn Litho	360
			83	Tech Web	360
			84	A.D. Weiss Lithograph	352
			85	Noll Printing	340
			86	L.P. Thebault Co.	330
			87	Neenah Printing	315
			88	Madison/Graham Colorgraphics	300
			89	Danbury Printing	300
			90	Babn Technologies	300
			91	S. Rosenthal & Co.	300
			92	Acme Printing	280
			93	Printco	265
			94	Daniels Printing	260
			95	Berlin Industries	250
			96	Sandy Alexander	250
			97	Riverside Press	200
			98	Pacific Lithograph	200
			99	Kukla Press	200
			100	Sayers Printing	185
			101	E/D Web	165

BUSINESS FORMS PRINTERS

Rank, Name (Parent), Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 **Moore Corporation Limited**[1], Toronto, Ont.	$2,422,034**	+ 2	25,021	M.K. Goodrich
2 **Standard Register**[1], Dayton, OH	716,410	+ 1	6,168	J. K. Darragh
3 **Uarco, Inc. (Settsu Corp.)**, Barrington, IL	692,000	+38	4,500	H.L. Koelling
4 **Wallace Computer Services, Inc.**[1], Hillside, IL	448,700	+ 5	3,000	T. Dimitriou
5 **American Business Products**[1], Atlanta, GA	398,794	+ 3	4,000	T.R. Carmody
6 **Reynolds & Reynolds**[1], **Business Forms Div.**, Dayton, OH	343,200	− 2	2,800	R.C. Nevin
7 **Duplex Products, Inc.**[1], Sycamore, IL	298,000	− 9	2,600	C.L. Peterson
8 **Bowater Communication Papers**[1], Moline, IL	280,900	−14	728	S.B. Saidman
9 **New England Business Service**[1], Groton, MA	233,113	+ 3	2,154	B.H. Calder
10 **NCR**[1], **Business Forms Div.**, Miamisburg, OH	200,000	+ 3	1,300	D.J. Enneking
11 **SCM Allied Paper, Inc.**, Dayton, OH	150,000	+ 2	600	W.H. Ames
12 **Ennis Business Forms, Inc.**[1], Ennis, TX	126,164	− 3	1,500	K.A. McCrady
13 **Office Electronics**, Itasca, IL	111,500	+ 6	575	R.A. Houston
14 **Shade Computer Forms**, Green Bay, WI	82,497	− 8	254	J.L. Kemerling

[In some cases, figures may include revenues from operations other than printing.]

THE GAM 101: OFFICIAL RANKING

Rank, Name, (Parent Company), Location	Sales Most Recent Fiscal Year (000)	Sales Previous Fiscal Year (000)	Change (%)	Employees	Sales Per Employee	Sites	Press Units: Sheetfed, Web Offset, Gravure, Other	Primary Products	CEO	Years in Business
1 **R.R. Donnelley & Sons**[1], Chicago, IL	$3,497,943	$3,122,331	+12	30,000	$116,600	42	*	COM	J.R. Walter	127
2 **Deluxe Corporation**[1], St. Paul, MN	1,413,553	1,315,828	+ 7	17,174	82,308	81	*	SPC	H.V. Haverty	76
3 **Quebecor Printing**, Montreal, Quebec	1,406,000**	1,258,000	+12	10,500	133,905	58	386,686,334,37[2]	COM,BK,PUB	J. Neveu/C. Cavell	2
4 **Lawson Mardon**[1], Mississauga, Ont.	992,383**	872,516	+14	7,500	132,320	50	*	SPC	L.G. Tapp	108
5 **World Color Press (Kohlberg Kravis Roberts & Co.)**, Effingham, IL	682,091	686,098	− 1	6,000	113,680	9	0,601,197,24[2]	PUB	R.G. Burton	88
6 **Ringier America (Ringier AG, Zurich)**, Itasca, IL	654,000	665,000	− 2	5,300	123,400	10	*	PUB	E.C. Nytko	98
7 **Banta Corporation**[1], Menasha, WI	577,600	517,200	+12	3,700	156,110	18	*	COM,BK,PUB,CAT	C.W. Aurand Jr.	90
8 **Valassis Inserts (Consolidated Press Holdings, Sydney, Australia)**, Livonia, MI	574,000	524,000	+10	1,207	475,560	3	5,61,0	INS	D. Brandon	22
9 **Arcata Graphics Company**, Baltimore, MD	562,000	523,000	+ 7	7,500	74,930	11	*	BK,PUB	J.W. Fowler	86
10 **Sullivan Graphics**, Brentwood, TN	554,000	566,000	− 4	4,060	136,450	29	0,97,0,4[2]	BK,INS	J.T. Sullivan	3
11 **Treasure Chest Advertising**, Glendora, CA	535,000**	500,000	+ 7	3,200	167,190	14	0,333,0	INS	S.G. Scheller	24
12 **Southam Graphics Group**[1], Toronto, Ont.	526,567	512,393	+ 3	4,100	128,431	24	*	COM,INS,PUB,CAT	M.A. Quinn	114
13 **Quad/Graphics**, Pewaukee, WI	454,000	400,000	+14	5,000	90,800	7	4,345,40	COM,PUB,CAT	H.V. Quadracci	20
14 **Brown Printing (Gruner + Jahr)**, Waseca, MN	407,000	383,000	+ 6	3,100	131,290	8	0,240,30	PUB,CAT,INS	D. Nitz	44
15 **Western Publishing**, Racine, WI	405,000	425,000	− 5	2,500	162,000	3	46,60,0,14[2]	COM,BK,PUB	W.O. Nahikian	84
16 **John H. Harland Company**[1], Atlanta, GA	371,300	344,700	+ 8	5,600	66,300	42	*	SPC	R.R. Wondson	68
17 **American Signature**, Memphis, TN	360,000	337,149	+ 7	2,400	150,000	5	10,204,0	PUB,CAT	T.A. Tevis	6
18 **Graphic Industries**[1], Atlanta, GA	329,123	310,330	+ 6	2,783	118,261	34	318,224,0,36[2]	COM	M.C. Pope III	21
19 **Trans-Continental Printing**[1], **(GTC Transcontinental Group)**, Saint-Laurent, Quebec	308,673**	274,214	+13	2,471	124,918	17	17,285,0	COM,INS,CAT,PUB	R. Marcoux	15
20 **Clarke American (MB-Caradon)**, San Antonio, TX	266,600	260,000**	+ 3	3,391	78,620	42	*	SPC	J.E. Coln	117
21 **Webcraft Technologies**, N. Brunswick, NJ	261,000	220,000	+21	1,600	163,130	3	*	SPC	R.E. Katz	22
22 **Continental Graphics Holdings**, Los Angeles, CA	220,000	303,000	−27	3,200	68,750	19	*	COM,BK	C.F. Bourland	3
23 **Bowne & Company**[1], New York, NY	201,217	189,577	+ 6	1,700	118,360	33	300,200,0,1[2]	FIN	R.H. Koontz	216
24 **Engraph**[1], Atlanta, GA	200,228	203,059	− 1	1,370	146,150	10	5,0,5,20[2],20[3]	SPC	L. Benatar	58
25 **Perry Printing (Journal Communications)**, Waterloo, WI	185,000	179,000	+ 3	1,750	105,710	7	25,150,25,60[3]	COM,PUB,INS,CAT	C. Hutchison	60
26 **Stevens Graphics**, Atlanta, GA	181,000	173,000	+ 5	1,200	150,830	4	44,38,0,4[2]	DIR	H.M. Inman	94
27 **Jostens**[1], Minneapolis, MN	176,000	153,000	+15	3,500	50,290	5	144,0,0	BK	W.H. Lurton	94
28 **Cadmus Communications**[1], Richmond, VA	170,375	160,671	+ 6	1,820	93,610	9	120,38,0	PUB	W. Stettinius	7
29 **Alden Press**, Elk Grove Village, IL	165,000	162,000	+ 2	700	235,710	1	0,73,0	COM,CAT	J. Spier	45
30 **Lehigh Press**, Cherry Hill, NJ	161,100	161,400	0	1,000	161,100	6	49,69,0,3[4]	COM,BK	J.D. DePaul	67
31 **Shorewood Packaging**[1], Farmingdale, NY	143,000	139,000	+ 3	1,100	130,000	9	*	SPC	P.B. Shore	25
32 **Bertelsmann Printing & Mfg. Corp.**, Berryville, VA	140,000	124,000	+13	1,100	127,270	5	*	BK	G. Thielen	4
33 **Queens Group**, Long Island City, NY	137,000	132,000	+ 4	918	149,240	4	72,22,0,2[3]	SPC	E. Kaltman	60
34 **Graphic Arts Center**, Portland, OR	133,000	119,000	+12	800	166,250	1	34,34,0	COM	F.M. Stammers	90
35 **United States Banknote**[1], New York, NY	130,000	60,000	+117	980	132,650	4	43,30,8,18[2],33[7]	SPC	M. Weissman	121
36 **Graphisphere Corp.**, Des Plaines, IL	120,000	110,000	+ 9	705	170,210	3	46,28,0	COM	G.R. Dorn	27
37 **Ivy Hill**[1] **(Time Warner)**, New York, NY	117,000	93,000	+26	970	120,620	4	113,0,0	COM	E. Kern	77
38 **Gulf Printing (Southwestern Bell)**, Houston, TX	112,000	105,000	+ 6	530	211,320	4	32,44,0,3[2]	COM	R.D. Cashman	75
39 **Fleming Packaging**, Peoria, IL	108,592	95,112	+14	750	144,790	7	72,13,9,13[2],34[12]	SPC	T.J. Fleming	57
40 **George Rice & Sons**, Los Angeles, CA	107,240	103,287	+ 4	484	221,570	1	30,24,0	COM	E. Grossberg	112
41 **Judd's Incorporated**, Washington, DC	107,200	114,100	− 6	1,066	100,560	2	8,66,0	BK,PUB	T.A. Manning	123
42 **Courier Corporation**[1], Lowell, MA	105,334	95,951	+10	1,402	75,130	5	18,40,0	BK	J.F. Conway Jr.	167
43 **Anderson Lithograph**, Los Angeles, CA	105,000	93,000	+13	450	233,330	1	36,24,0	COM	G.T. Parana	40
44 **Shea Communications**, Louisville, KY	104,738	104,177	+ 1	725	144,470	2	0,40,39	CAT	M.D. Shea	3
45 **Merrill Corporation**[1], St. Paul, MN	101,000	69,000	+46	850	118,820	4	31,22,0	FIN	J. Castro	23
46 **Meehan-Tooker**, East Rutherford, NJ	98,000	95,000	+ 3	530	184,910	4	39,94,0	COM	M.D. Voss	47
47 **Moebius Printing**, Milwaukee, WI	97,850	98,000	0	559	175,040	2	19,44,0	COM	M.C. McDonough	80
48 **Taylor Publishing (Insilco)**, Dallas, TX	90,000	87,800	+ 4	1,200	75,000	4	57,0,0,1[2]	BK	F.P. Perliski	52
49 **Instant Web Companies**, Chanhassen, MN	90,000**	98,000	− 8	1,200	75,000	4	0,62,0	COM,SPC	J. Carlson	22
50 **Americribe Management Services**[1], New York, NY	88,000	80,000	+10	1,900	46,320	225	*	IMG	W.J. Shaw	12

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THE GAM 101: OFFICIAL RANKING

Rank, Name, (Parent Company), Location	Sales Most Recent Fiscal Year (000)	Sales Previous Fiscal Year (000)	Change (%)	Employees	Sales Per Employee	Sites	Press Units: Sheetfed, Web Offset, Gravure, Other	Primary Products	CEO	Years in Business
51 **Arandell-Schmidt (Arandell Corp.)**, Menomonee Falls, WI	85,500	85,407	0	413	$207,020	1	0,24,0	COM	F.E. Treis	69
52 **Mack Printing**, Easton, PA	81,226	54,433	+49	1,400	58,020	3	37,65,0	PUB	P.F. Mack	90
53 **Century Graphics**, Metairie, LA	80,000	50,000	+60	360	222,220	2	0,24,0	INS	C.J. Eberts	35
54 **Alford Industries (Lancer Industries)**, Ridgefield Park, NJ	78,000	86,389	−10	600	130,000	4	36,0,53,10[2],38[12]	SPC	J. Hildner	89
55 **Case-Hoyt (BCE, Inc.)**, Rochester, NY	78,000	N/A	N/A	500	156,000	2	28,26,0	COM	K. Kirk	72
56 **Petty Co., Inc.**, Effingham, IL	$77,730	$71,046	+ 9	500	155,460	2	0,69,0	COM	G.A. Whaling	16
57 **Publishers Press, Inc. (Publishers Printing)**, Shepherdsville, KY	77,000	72,000	+ 7	1,046	73,610	3	6,74,0	PUB	N.X. Simon	125
58 **Hart Graphics**, Austin, TX	72,500	58,152	+ 25	750	96,670	6	50,36,0,1[3],17[8]	COM	W.L. Hart	81
59 **Continental Web Press**, Itasca, IL	67,000	65,000	+ 3	425	157,650	1	0,88,0	COM	K.W. Field	18
60 **Combined Communication**, Lisle, IL	60,250	58,300	+ 3	650	92,690	2	6,40,0	PUB	R. Sanderson	45
61 **K/P Companies**, Berkeley, CA	58,497	54,519	+ 7	625	93,600	18	*	COM	J.W. Knapp	25
62 **Webcrafters**, Madison, WI	58,000	60,000	− 3	630	92,060	2	3,13,0,4[2]	BK	J.J. Frautschi	101
63 **Berlin Industries (Smith Investment)**, Addison, IL	58,000	58,000	0	250	232,000	2	0,44,0	COM	F.E. Schmitt	55
64 **Sleepeck Printing**, Bellwood, IL	57,700	56,000	+ 3	425	135,760	3	*	COM	M.W. Sleepeck	87
65 **Fort Dearborn Lithographic Co.**, Chicago, IL	56,800	50,500	+ 12	360	157,780	3	60,0,0	SPC	T.W. Adler	68
66 **Keller-Crescent**, Evansville, IN	56,000	48,000	+ 17	560	100,000	2	37,0,0,6[2]	COM	T.M. Smythe	106
67 **Serigraph, Inc.**, West Bend, WI	55,600	54,900	+ 1	820	67,800	3	8,0,0,35[4]	SPC	J.B. Torinus Sr.	42
68 **Spencer Press**, Wells, ME	55,500	54,000	+ 3	470	118,090	1	0,27,0	CAT	J.E. Spenlinhauer III	51
69 **Madison/Graham Colorgraphics**, Los Angeles, CA	55,000	50,000	+ 10	300	183,330	3	26,23,0	COM	C.N. Madison	38
70 **L.P. Thebault Company**, Parsippany, NJ	54,000**	54,000	0	330	163,640	1	31,12,0	COM	J.B. Thebault	37
71 **Sheridan Group**, Hanover, PA	53,333	51,739	+ 3	770	69,260	2	41,0,0	PUB,BK	R.C. Sheridan	76
72 **Tech Web, Inc.**, Wheeling, IL	53,250	54,200	− 2	360	147,920	1	0,36,0	COM	D.G. Weymouth	15
73 **AGI Incorporated**, Melrose Park, IL	52,597	42,627	+ 23	408	128,910	1	22,5,0	COM,SPC	R. Block	23
74 **Edwards Brothers**, Ann Arbor, MI	52,140	48,459	+ 8	700	74,490	3	12,2,0	PUB,BK	M.H. Edwards	98
75 **Avanti Press**, Miami, FL	52,000	46,000	+ 13	400	130,000	1	0,18,0	COM,CAT	J.R. Arriola	26
76 **Sandy Alexander (Mickelberry Corp.)**, Clifton, NJ	52,000	43,000	+ 21	250	208,000	1	30,16,0	COM	F. Stillo	27
77 **Northeast Graphics**, North Haven, CT	52,000	46,000	+ 13	400	130,000	1	17,43,0	COM	S. Bortner	3
78 **Printco**, Greenville, MI	48,565	49,019	− 1	265	183,260	2	0,40,0	INS	J.A. Pentecost	22
79 **Danbury Printing & Litho**, Danbury, CT	48,000	48,000	0	300	160,000	1	17,36,0	COM	M. Previdi	45
80 **The Riverside Press**, Dallas, TX	47,671	40,719	+ 17	200	238,360	1	35,0,0	COM	G.C. Marsh	101
81 **Japs-Olson**, Minneapolis, MN	46,700	40,650	+ 15	400	116,750	2	51,85,0,3[2],34[3]	COM	R.E. Murphy	84
82 **Cairn Capital, Inc.**, Toronto, Ont.	46,186**	53,509	− 14	454	101,731	6	*	COM	D.M. Alloway	46
83 **Pacific Lithograph**, San Francisco, CA	46,000	43,000	+ 7	200	230,000	1	29,12,0	COM	E.J. Flynn II	42
84 **Universal Printing**, St. Louis, MO	46,000	44,000	+ 5	400	115,000	2	38,13,0,7[2]	COM	R.A. Ebel	52
85 **Waverly Press[1] (Waverly Inc.)**, Baltimore, MD	45,200	44,710	+ 1	610	74,100	2	22,12,0	PUB	B. Knox	101
86 **Noll Printing (Our Sunday Visitor)**, Huntington, IN	45,100	45,140	0	340	132,650	1	0,29,0	CAT	R. Ciavola	13
87 **Graftek Press[1] (Devon Group)**, Woodstock, IL	45,000	43,300	+ 4	527	85,390	4	19,53,0	PUB	S.B. Pearlman	24
88 **Williamson Printing**, Dallas, TX	45,000	45,000	0	390	115,380	2	40,24,0,7[2]	COM	J. Williamson	107
89 **Henry Wurst, Inc.**, North Kansas City, MO	43,178	52,097	− 17	370	116,697	2	0,32,0	COM	J.C. Wurst	54
90 **Solar Press, Inc.**, Naperville, IL	42,000	37,000	+ 14	600	70,000	3	0,35,0	SPC	F.C. Hudetz	19
91 **Prolitho**, Provo, UT	42,000	44,000	− 5	600	70,000	2	42,32,0	BK	D.A. Rapier	6
92 **Babn Technologies (BCE, Inc.)**, Montreal, Quebec	40,527	53,807	− 25	300	135,090	2	0,24,0,42[3],6[4]	SPC	J.P. Desbiens	46
93 **A.D. Weiss Lithograph[1] (St. Ives)**, Hollywood, FL	40,000	30,000	+ 33	352	131,636	1	0,76,0	PUB	Q.J. Jones	43
94 **Acme Printing, Inc.**, Wilmington, MA	40,000	35,000	+ 14	280	142,857	1	40,12,0	COM	F.W. Canzano Jr.	61
95 **Wisconsin Color Press (Mid Continent)**, Milwaukee, WI	40,000	40,000	0	450	88,888	1	0,40,0	PUB	F. Cappetta	63
96 **Kukla Press, Inc.**, Elk Grove Village, IL	40,000	40,000	0	200	200,000	1	0,54,0	COM	S.J. Kukla	27
97 **Sayers Printing Company (Graphic Innovators)**, St. Louis, MO	36,700	33,800	+ 9	185	198,374	1	17,22,0,1[2]	INS	H.M. Sayers	79
98 **S. Rosenthal & Co.**, Cincinnati, OH	36,400	36,400	0	300	121,333	1	10,32,0	PUB	T.N. Rosenthal	123
99 **Daniels Printing**, Everett, MA	36,052	36,044	0	260	138,662	1	46,6,0,5[2]	COM,FIN	L.S. Daniels	111
100 **E/D Web**, Cicero, IL	35,000	32,000	+ 9	165	212,121	1	0,29,0	COM	B. Love	26
101 **Neenah Printing (Menasha Corp.)**, Neenah, WI	34,548	32,715	+ 6	315	109,676	3	42,20,0,2[2]	COM	W. Drew	91

GREETING CARD PRINTERS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Employees	CEO
1 **Hallmark Cards**, Kansas City, MO	$2,700,000	+ 8	22,200	I.O. Hockaday
2 **American Greetings[1]**, Cleveland, OH	1,431,806	+ 4	21,400	M. Weiss
3 **Gibson Greetings[1]**, Cincinnati, OH	513,000	+10	4,500	B.J. Sottile

COLOR TRADE SHOPS

Rank, Name, Location	Sales Most Recent Fiscal Year (000)	Change (%)	Equipment: Scanners	Equipment: Color Pagination Systems	CEO
1 **Wace USA[1]** (Wace Group, London) Chicago, IL	$153,000	+43	27	44	J. J. Collins
2 **Applied Graphics Technologies**, New York, NY	111,000**	*	19**	18**	F. Drasner P. Faucetta
3 **Jannock Imaging**, Toronto, Ont.	86,576**	−10	6	10	W.H. Batten/ J. Lane
4 **Schawk Inc.**, Des Plaines, IL	80,000	+29	17	11	C.W. Schawk
5 **Black Dot Graphics[1]** (Devon Group), Crystal Lake, IL	76,559	0	6	8	J.W. Dinzole
6 **American Color** (Sullivan Graphics), Phoenix, AZ	71,331	+24	28	10	D. Brazell
7 **Enteron Group**, Chicago, IL	52,000	+13	6	4	J.J. Reilly
8 **Lanman Companies**, Washington, DC	47,800**	+ 7	10	5	B.B. Cunningham
9 **Color Associates**, St. Louis, MO	29,400	+ 5	3	3	C.W. Bauer
10 **Kwik International Color**, New York, NY	24,000	+17	3	3	R.J. Sirota
11 **Magna Graphic Inc.**, Lexington, KY	19,800	+13	5	3	K. Engle
12 **Blanks Color Imaging**, Dallas, TX	19,475	+10	5	3	L. Blanks
13 **H&S Reliance Ltd.**, Toronto, Ont.	17,184**	+ 4	2	4	J.A. Davidson
14 **NEC Inc.**, Nashville, TN	17,100	− 3	3	7	R.W. Luckett
15 **Rex Three**, Miami, FL	17,100	+ 4	5	5	J. Miller
16 **Herzig Somerville**, Toronto, Ont.	15,741**	+ 7	3	7	E. Herzig

[Editor's Note: Ongoing company consolidations, the merging of international operations, and the changing nature of the prepress business make it impossible to compile comparative information. Also, many companies cannot isolate revenues for color separation services; thus, their revenues may include typesetting, color retouching, custom photo processing, electronic prepress services, and printing. Revenues for American Color are excerpted from the Sullivan Graphics total.]

EXPLANATION OF ABBREVIATIONS

COM Commercial Printing
PUB Publications
BK Books
CAT Catalogs
SPC Specialty
INS Inserts
FIN Financial Printing
DIR Directory Printing
IMG In-plant Management

FOOTNOTES

1 Publicly held
2 Letterpress
3 Flexo press
4 Screen press
5 Diecutting
6 Gold leaf press
7 Sheetfed intaglio
8 Forms press
9 Coaster press
10 Cameron belt press
11 Cooler
12 Specialty press

* Information not available
** Estimated